www.oppenheimer.com

Stephen Seremetis
Managing Director – Investments
(212) 338-5935
stephen.seremetis@opco.com

Joshua Scherer
Managing Director – Investments
(212) 667-4388
joshua.scherer@opco.com

Kevin Cockerill
Financial Advisor
(212) 667-4066
kevin.cockerill@opco.com

About Our Team

The North Hill Group of Oppenheimer & Co. Inc. brings expertise in Wealth Management Services together with the Portfolio Management and institutional capabilities of Oppenheimer & Co. Inc. Our offices are located in the heart of Midtown Manhattan in the Chrysler East Building.

Wealth Management Services

The North Hill Group offers an array of wealth management services. Our experienced professionals will sit down with you to discuss your short- and long-term financial objectives and create a plan to help you achieve them. This can include building an investment portfolio, managing your assets, developing a retirement plan, or protecting your wealth through various trust and asset management services. Our wealth planning process is personalized to you, in order to help you meet your needs today and prepare for changes in the future.

We Want to Work With You to Help You Achieve Your Financial Goals

Investment Advice

- Professional Money Manager Selection through our Oppenheimer Asset Management Division
- Asset Allocation
- Portfolio Construction

Wealth Planning

- Goals Based Planning
- Retirement Planning
- Tax & Estate Planning
- College Savings Plans
- Social Security Optimization Strategies
- Cash Management & Cash Flow Planning

Insurance Services

- Life Insurance and Annuities
- Long-Term Care
- Disability
- Health

Mobile Application

- Secure Online Access to Accounts

Trust, Estate and Legacy Planning

- Wills, Trusts, Estate Planning, Wealth Transfer Strategies offered through our Oppenheimer Trust Company of Delaware partners.

Our Wealth Planning Process

Our process starts with a comprehensive wealth plan to truly understand our clients' unique financial situation. We then gather all relevant information regarding your goals, concerns, assets and estate plan. Next, we conduct a thorough analysis into your current status and provide a detailed plan of action to help you address your goals, including strategic allocation, savings rates, debt repayment, retirement income, charitable giving strategies, and wealth transfer. Once a plan of action has been agreed upon we work with you every step of the way.

For More Information, Contact The North Hill Group Today!

(212) 667-4388 or (212) 338-5935

NorthHillGroup@opco.com

Oppenheimer & Co. Inc.
Chrysler East Building
666 Third Avenue, 13th Floor
New York, NY 10017